



Appendix

Beyond E-mail: Understanding Additional Outlook Features

Objectives

- ▶ Manage your appointments and tasks
- ▶ Manage your contacts
- ▶ Preview your day

To effectively use Microsoft Outlook 2002 in managing your business and personal information, it is important to know not only how to use the Inbox to send and receive e-mail, but also how to use the additional components in Outlook. Outlook integrates several tools, including Inbox, Calendar, Contacts, Tasks, Notes, and Outlook Today to provide you with a uniquely comprehensive information manager.

Now that you know how to manage your e-mail with the Inbox, you will learn how Outlook combines e-mail with its other components to create an integrated desktop information manager.



Managing Your Appointments and Tasks

The Calendar and Tasks in Microsoft Outlook provide convenient, effective means to manage your appointments and tasks. **Calendar** is the electronic equivalent of your desk calendar, while **Tasks** is an electronic to-do list. Calendar defines an **appointment** as an activity that does not involve inviting other people or scheduling resources, a **meeting** as an activity you invite people to or reserve resources for, and an **event** as an activity that lasts 24 hours or longer. You can specify the subject and location of the activity, and its start and end times. You can also ensure that you do not forget the activity by having Outlook sound a reminder prior to the start of the activity. Outlook will notify you if the activity conflicts with, or is adjacent to, another scheduled activity. You can view any period of time in Calendar. For example, you can look at and plan activities for next month or even next year.

Details

Review the following features of Calendar and Tasks:

- ▶ To review your appointments, meetings, and events, open the **Outlook Shortcuts** group on the Outlook Bar, then click the **Calendar shortcut**. The Calendar is shown in Figure AP-1. To make your view match the figure, click View on the menu bar, point to Current View, click Day/Week/Month with AutoPreview, then click the Day button on the toolbar. To create appointments, click the **New Appointment button**  on the Standard toolbar. Recurring appointments are entered once, and then you set a recurrence pattern. The appointments that recur have a special icon.
- ▶ To facilitate planning your activities, you can choose to view Calendar by day, week, or month, and you can use the **Date Navigator** to quickly view specific dates. Dates displayed in boldface on the Date Navigator indicate days on which you have scheduled appointments.
- ▶ To schedule a meeting by having the Calendar check the availability of all the invitees and resources, once you have selected a meeting time and location, you can send invitations in meeting requests. If an invitee accepts the invitation, Outlook will post the meeting automatically to the invitee's calendar.
- ▶ To publish a Calendar over the Web, you save the Calendar as an HTML file. It can then be shared over an **intranet** or over the Internet.
- ▶ To manage your business and personal to-do list, click the **Tasks shortcut** in the Outlook Shortcuts group on the Outlook Bar. Figure AP-2 shows the Tasks in Simple List view.

Click the **New Task button**  to create new tasks. Once you create a task, you can work with that task in several ways. Click the **Organize button**  to organize your tasks by grouping them by **Category**. Outlook provides a list of 20 categories such as Ideas, Personal, and Competition, or you can create your own. View your tasks in several different ways, including by subject, by status, and by due date. You can mark your progress on tasks by percentage complete, and you can have Outlook create status summary reports in e-mail messages and then send the update to anyone on the update list.

Use the **New Task Request** command on the Actions menu to assign tasks to a coworker or assistant and have Outlook automatically update you on the status of the task completion. To help you coordinate your tasks and your appointments, the task list from Tasks can be displayed in the **TaskPad** in Calendar. To schedule time to complete a task, simply drag a task from the TaskPad to a time block in the Calendar. Any changes you make to a task are reflected in both the TaskPad in Calendar and the task list in Tasks.

QuickTip

Notes is the electronic version of the popular colored paper sticky notes.

- ▶ To quickly write down an idea or a note concerning an appointment or a task, simply click the **Notes shortcut** on the Outlook Bar and click the **New Note button**  on the toolbar. Notes can be color-coded as well as organized by Category. See Figure AP-3.

FIGURE AP-1: Calendar

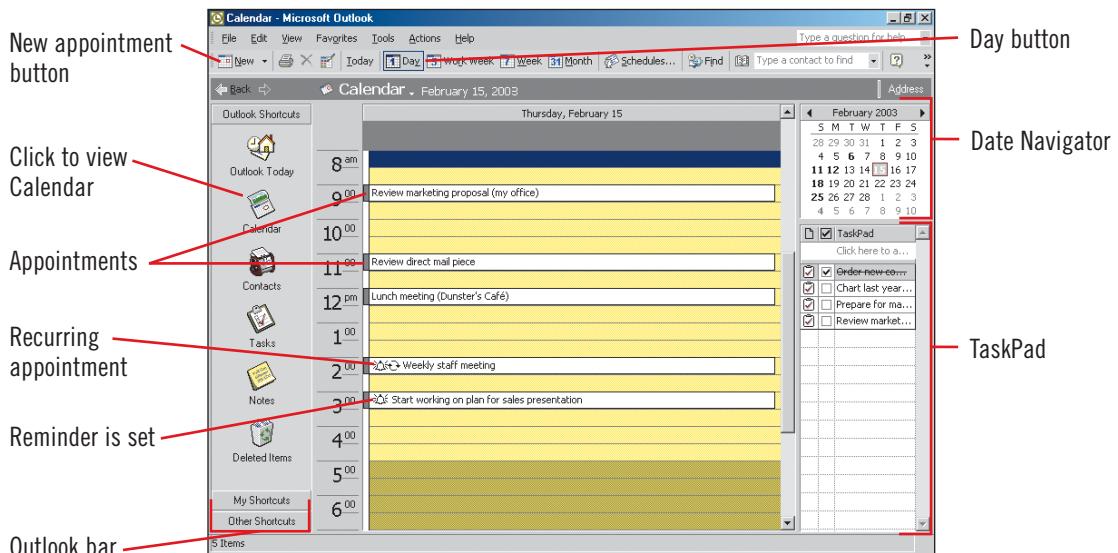


FIGURE AP-2: Tasks

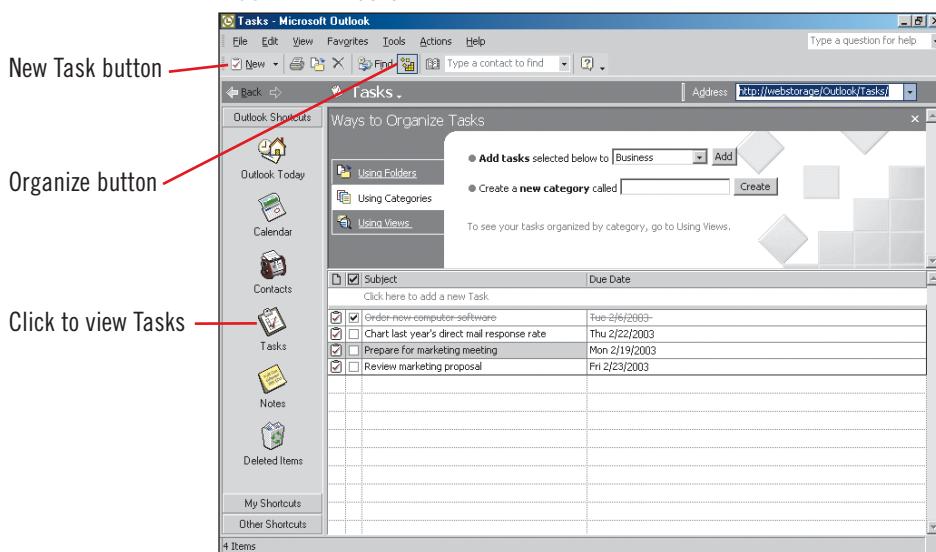
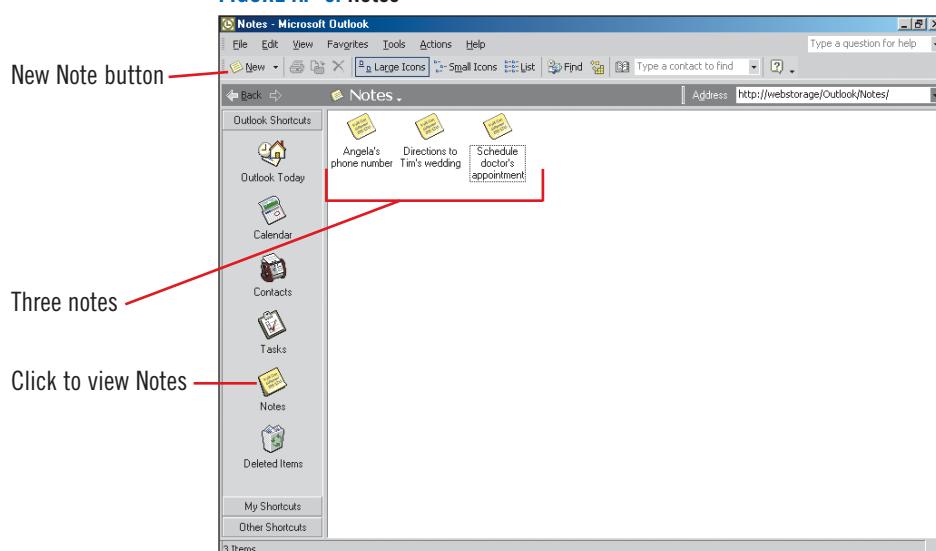


FIGURE AP-3: Notes



Managing Your Contacts

Contacts in Microsoft Outlook enables you to manage all your business and personal contact information. With Contacts, you can store general and detailed information for the people you want to communicate with. From Contacts, you can quickly send a meeting request, task request, or a simple e-mail message. You can sort, group, and filter contacts by any parts of their name or address to help you manage and stay in touch with your personal and business contacts. You can also easily share contacts within your business or personal community.

Details

Review the following features of Contacts:

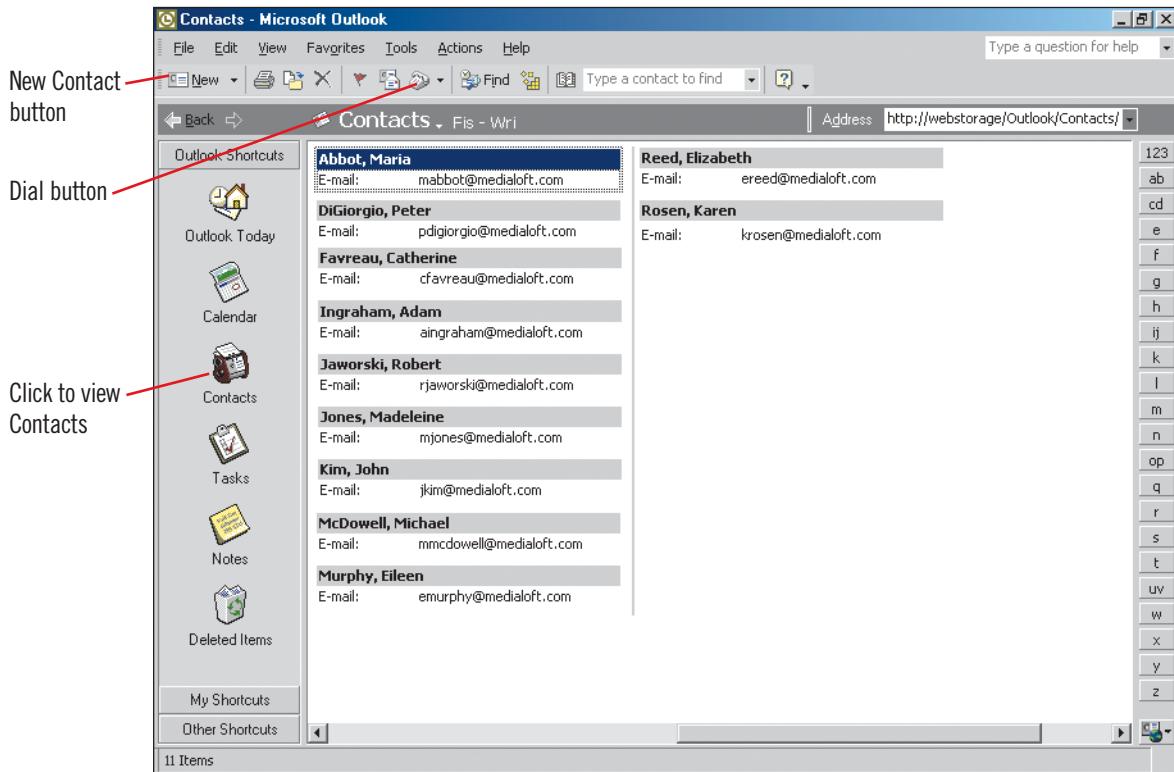
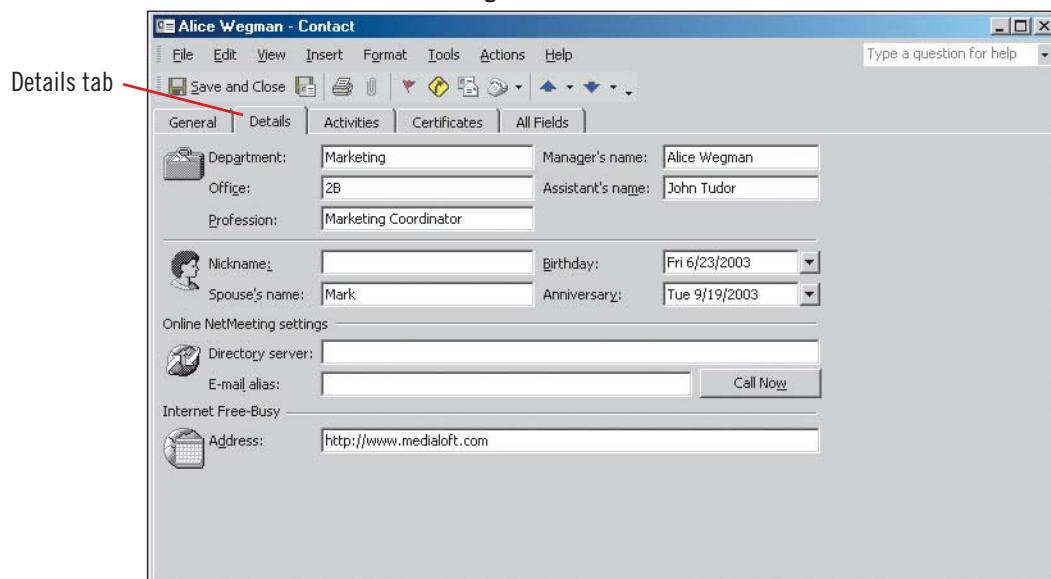
- ▶ To open Contacts, click the **Contacts shortcut** on the Outlook Bar. See Figure AP-4. Click the **New Contact button**  on the toolbar to enter information for a new contact.

Type the contact's name in the Name text box. If you do not enter a first and last name, the Check Full Name dialog box will open, allowing you to enter the full name for the contact, including title, first name, middle name, last name, and suffix if appropriate. You can also open the Check Full Name dialog box, by clicking the **Full Name button**. You can filter, sort, and group your contacts by any part of their names.

You can store up to three addresses in the Address text box, by choosing Business, Home, or Other from the Address list, then typing the address in the Address text box. If Outlook can't identify an appropriate street, city, state/province, postal code, and country/region, the Check Address dialog box will open for you to verify or complete the information. You can store more than a dozen telephone and fax numbers, three e-mail addresses, and a Web page address. Click the **Details tab** to store each contact's detailed information, including the department or office, the assistant's or manager's name, the contact's birthday, anniversary, or even the contact's nickname. Figure AP-5 shows the Details tab of Alice Wegman's contact information.

Outlook allows you to file each contact under any name that you choose, including by first name, last name, a company name, or company or job title. Outlook will automatically present you with several File as options. Once you have entered your contacts' information, you can view your contacts in a variety of ways, including as detailed address cards, as a phone list, or by company, category, or location.

- ▶ Quickly dial a contact telephone number if you have a modem. Click the **Dial button**  on the Contacts toolbar, to open the New Call dialog box. After Outlook has dialed the phone number, pick up the phone handset then click **Talk**.
- ▶ Keep track of all e-mail, tasks, appointments, and documents relating to specific contacts. For example, when you create a new Outlook item, such as a task, you can link it to the contacts to which it relates. You can also link any items, such as meetings, that already exist in folders to the relevant contacts. And, you can link documents and files you create in other Office programs to contacts.
- ▶ Send contact information over the Internet by using **vCards**, the Internet standard for creating and sharing virtual business cards. To send a vCard to someone via e-mail, click **Contacts**, click the contact you want to send as a vCard, click **Actions** on the menu bar, then click **Forward as vCard**. You can also include your vCard with your e-mail signature.
- ▶ Create a mailing list that's a subset of your Contacts folder, by filtering the Contacts list, and then using the filtered list to begin a mail merge from Outlook. When you **filter** a list, you search for only specific information—for example, only those contacts that live in New Jersey. You can create a variety of merged documents in Word, then you can begin your mail merge from Outlook. You can create form letters, print mailing labels, or print addresses on envelopes. You can also send bulk e-mail messages or faxes to your contacts. To send a mail merge to a filtered set of your contacts, click **View** on the menu bar in Contacts, point to **Current View**, and then click **Customize Current View**. Click **Filter** and then specify the filter criteria. Once you have filtered the contacts you want for the merge, to start the mail merge, **Tools** on the menu bar, then click **Mail Merge**.

FIGURE AP-4: Contacts displayed in the Contacts window**FIGURE AP-5:** Details tab of Alice Wegman's Contact window

Previewing Your Day

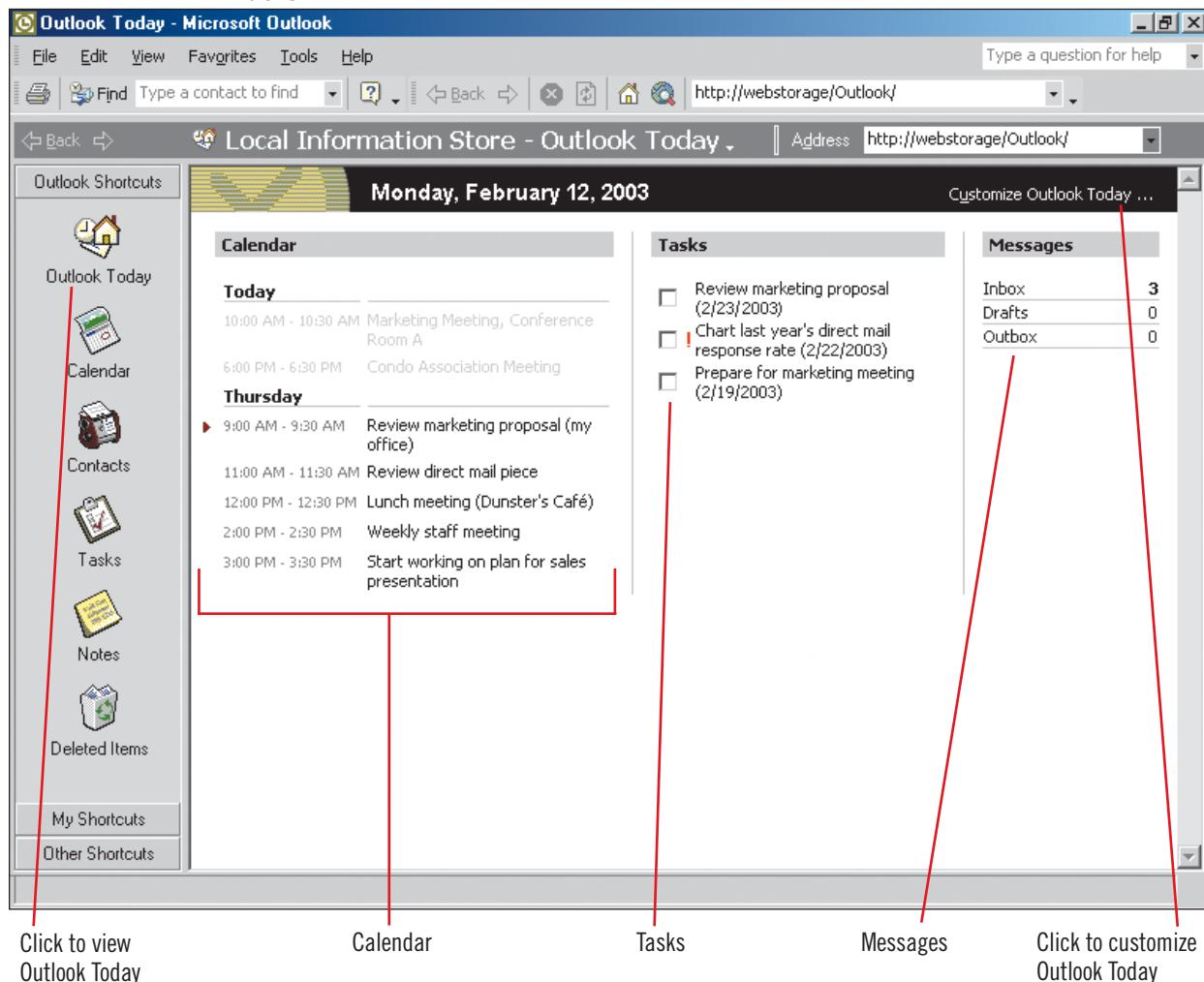
The **Outlook Today page** provides a preview of your day at a glance. It is the electronic version of your day planner book and provides a snapshot view of the current activities, tasks, contacts, notes, and messages in the Outlook folders. Just as with a paper-based daily planner, you can customize how you view Outlook Today to fit your personal style and work habits. See Figure AP-6.

Details

Review the following features of Outlook Today:

- ▶ View how many messages are in your Inbox, Outbox, and Drafts folders. The right column of Outlook Today displays your message information. You can customize Outlook Today to show any of your Personal Folders in the Messages column.
- ▶ View your appointments over the next few days. These appear in the Calendar section of Outlook Today, which is located in the left column. You can choose to show anywhere from 1–7 days of appointments in your Calendar.
- ▶ View your to do list to see what you have to do. Tasks appear in the center column of Outlook Today, allowing you to list all of your tasks in one convenient place. You can customize Outlook Today to show all your tasks or just today's tasks. You can also sort your tasks by Importance, Due Date, Creation Time, or Start Date, and in ascending or descending order. In addition, you can keep track of tasks by clicking the check box to the left of the task to indicate you've completed it. The task list will be updated automatically in the Tasks folder.
- ▶ View detailed information on any item in Outlook Today by clicking the task, appointment, or meeting. Clicking the appointment or meeting opens the item's dialog box.
- ▶ Customize the Outlook Today page for the way you work by clicking Customize Outlook Today. You can make Outlook Today your default page when you start Outlook. You can change the way tasks appear on the Outlook Today page, change how many days' appointments appear on the Outlook Today page, determine which folders appear so you can see how many messages are in each folder, and change the style of Outlook Today (how it looks). The styles lay out the calendar, messages, and tasks in different column arrangements with special background colors and text effects.

FIGURE AP-6: Outlook Today page

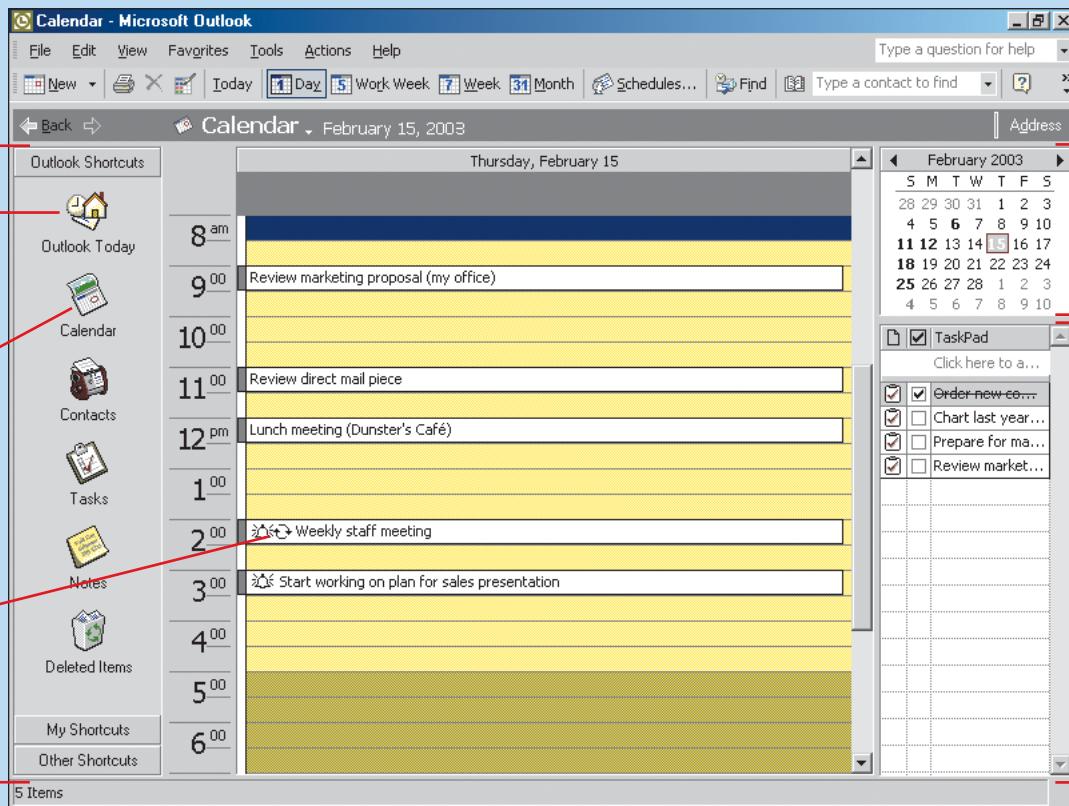


Practice

► Concepts Review

Label the elements of the calendar window shown in Figure AP-7.

FIGURE AP-7



Select the best answer from the list of choices.

7. Which of the following is *not* one of the Outlook folders:
 - a. Inbox
 - b. Meeting Planner
 - c. Calendar
 - d. Notes

8. Use the _____ to schedule your appointments, meetings, and events.
 - a. Calendar
 - b. Tasks
 - c. Notes
 - d. Contacts

9. Use the _____ to manage your business and personal to-do list.
 - a. Calendar
 - b. Tasks
 - c. Notes
 - d. Contacts

10. Use the _____ to supplement the information stored in Calendar and Tasks.
 - a. Calendar
 - b. Tasks
 - c. Notes
 - d. Contacts